

National Transportation Safety Board

Trends and Safety Statistics



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Vice President, Research & Technology Standards

OUR PURPOSE TODAY

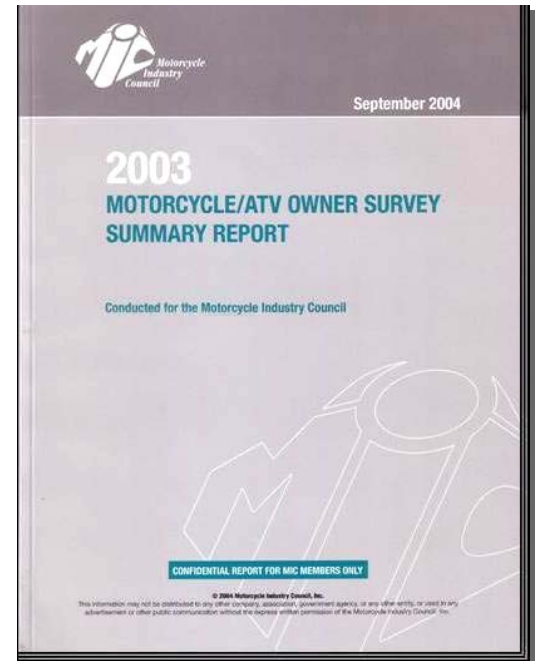
- **Provide background for our discussions**
- **Understand the industry and its stakeholders**
 - Vehicle population
 - Owner demographics
 - Sales trends
- **Provide summary information from:**
 - MIC Motorcycle Owner Survey,
MIC Retail Sales Reporting System,
MSF Rider Characteristics Survey

THE MOTORCYCLE INDUSTRY COUNCIL

- **Not-for-profit national trade association**
- **Preserve and promote motorcycling**
 - Activities in government relations, statistics, communications, technical, and aftermarket programs.
- **More than 300 members**
 - Manufacturers and distributors of motorcycles and scooters, parts & accessories
- **Allied trades**
 - Publishing companies, advertising agencies, insurance firms and consultants
- **Existed since 1914**

THE MIC OWNER SURVEY

- **Motorcycle Industry Census**
- **Conducted by MIC since 1975**
- **Major consumer telephone surveys in 1975, 1980, 1985, 1990, 1998, and 2003**



SURVEY METHODOLOGY

Questionnaire development

- Initial review by MIC Statistics subcommittee.
- Draft distributed to MIC members for review & comment.
- Input incorporated / questionnaire finalized by selected research firm.

Study

- Conducted by telephone using national probability sample of HHs.
- 12 month period used to eliminate seasonal bias.
- Included 2,018 owning HHs and 2,007 non-owning HHs.
- 300,000 Households called in order to reach owning HHs.
- Up to 6 callbacks were made to identify owning HHs.
- MIC Staff reviewed raw data and categorized model info for each respondent.
- A report summary, set of detailed reports and approximately 3,000 tables produced by research firm.

OWNER SURVEY TOPIC AREAS

- Vehicle Ownership
- Owner Demographics & Interests
- Vehicle Aftermarket accessories, maintenance, and financing
- On-Highway Usage including mileage, type of riding, licensing and training issues
- Off-Highway Usage
- Non-Owners attitudes toward owning, motorcyclists, and awareness of training

WHO ARE WE? MOTORCYCLISTS DEMOGRAPHICS

	1990	1998	2003
Median Age	33	40	42
Married	58.7%	61.4%	56.2%
HH Income	\$32,700	\$45,100	\$55,800
Managerial/Professional	26.9%	34.8%	36.7%
Some College and Beyond	41.5%	48.9%	54.9%
Percent Female	6.7%	8.9%	10.1%
Carrying Health Insurance	85.2%	87.6%	86.5%

Source: MIC Motorcycle Owner Survey

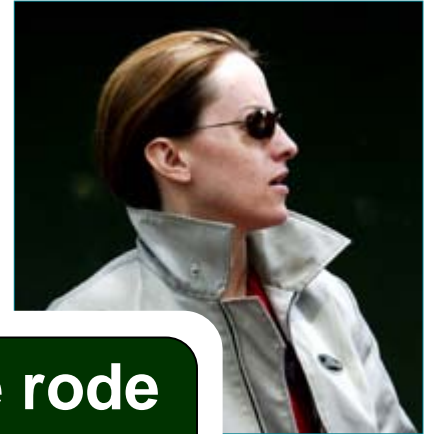
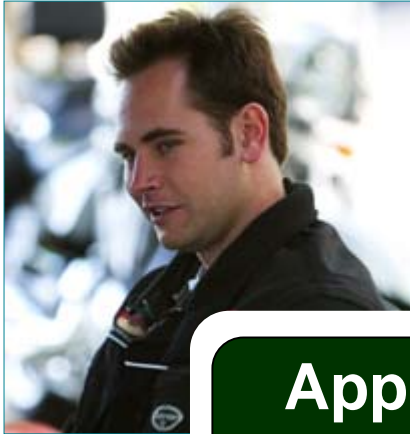
WHO ARE WE? COMPARED TO YOU... AND WITHIN GROUPS

	MOTORCYCLE OWNERS	U.S. POPULATION
Median Age	42	35
Median Household Income	\$55,850	\$48,868
Level of Education		
Some college & beyond	54.9%	52.46%
Occupation		
Managerial/Technical/Professional	34.9%	38%*

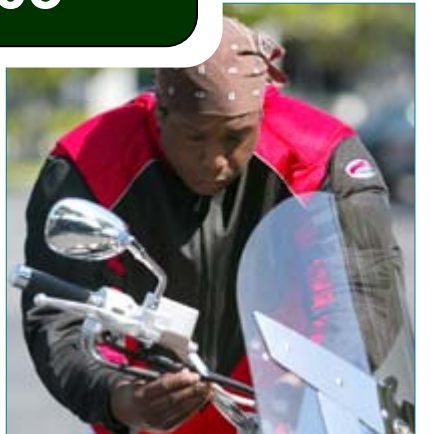
Source: U.S. Census Bureau Current Population Survey, Annual Social and Economic Supplemental, 2003

** Percent employed civilians 25 to 64 years old*

WHO ARE WE?

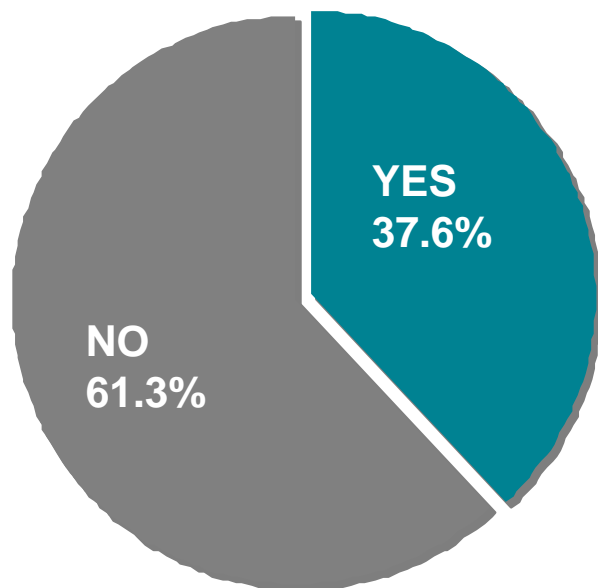


Approximately 16 MILLION people rode motorcycles on-highway in 2003

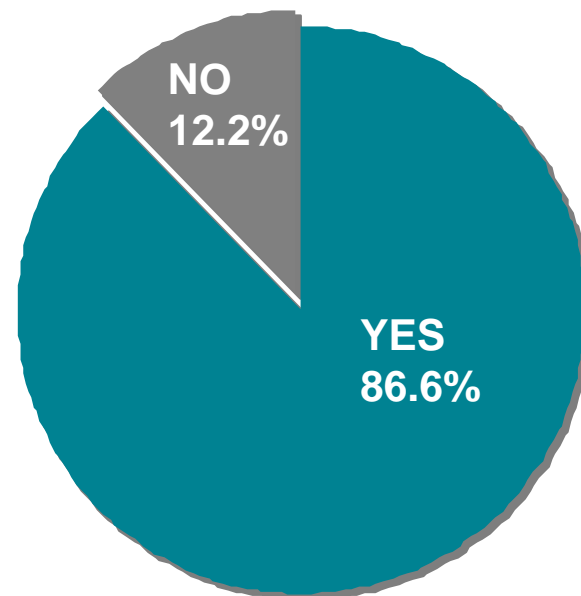


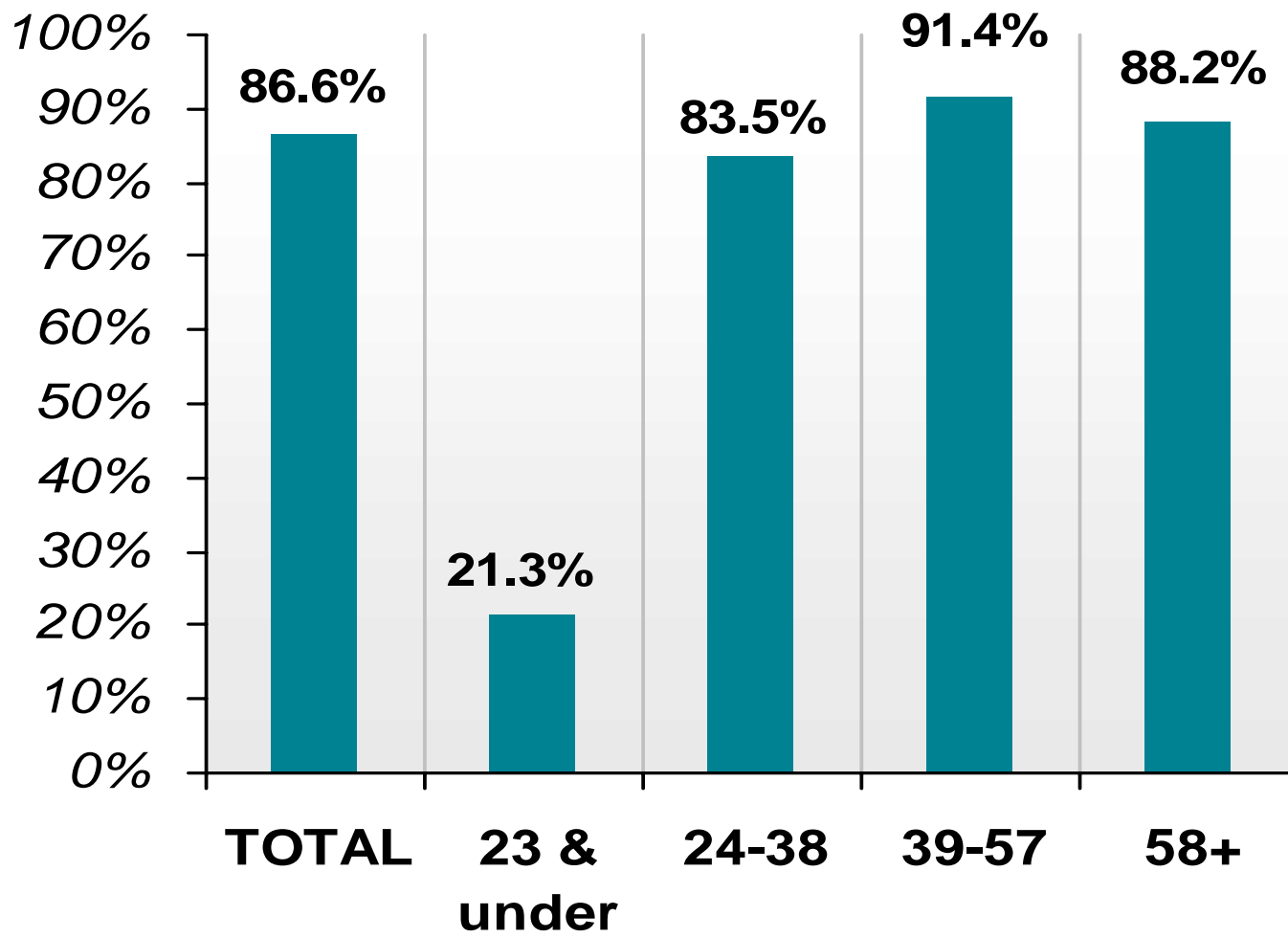
RIDER TRAINING & LICENSING

**Taken an Organized
Rider Education Class?**



Valid Operator's License?





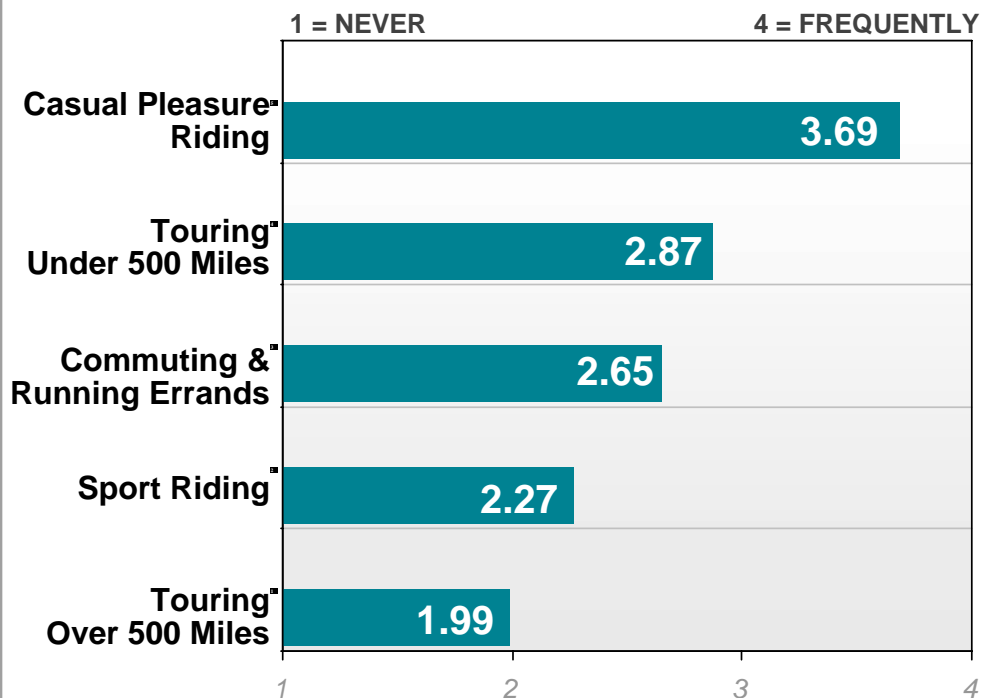
HOW DO WE RIDE OUR MOTORCYCLES?

2003 Owner Self-Reported Mileage

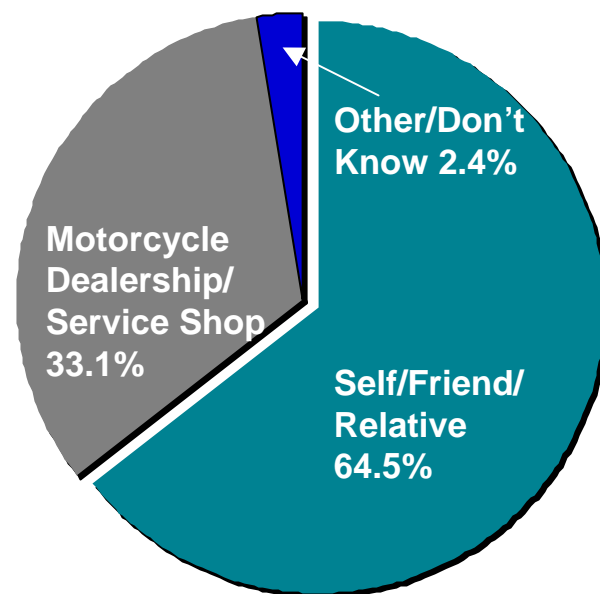
3,019

AVERAGE ANNUAL MILES

Types of Riding



Maintenance



WHAT ABOUT OUR MOTORCYCLES?

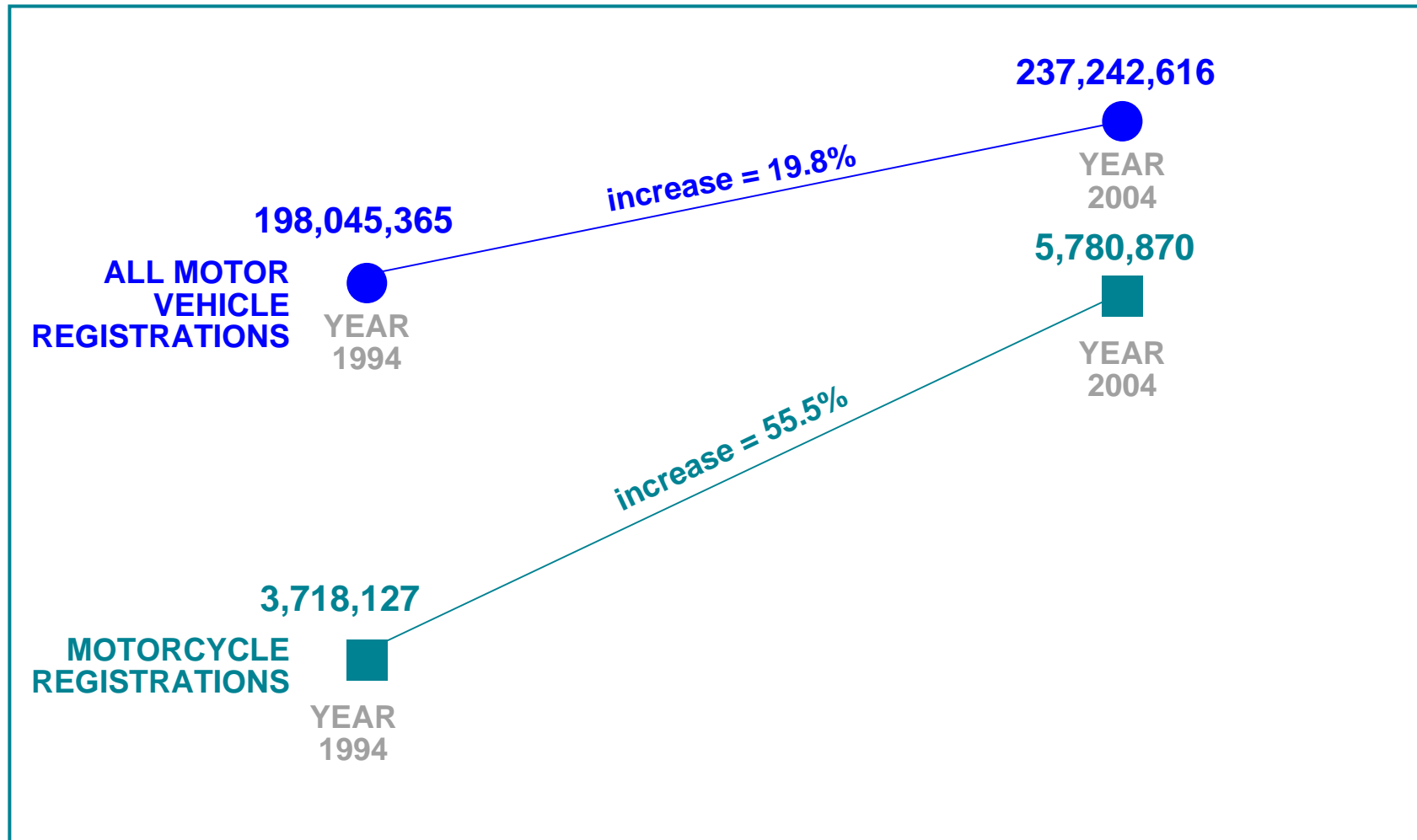
	1990	1998	2003
New Unit Sales			
On-Highway & Dual Motorcycles	226,000	311,000	683,000
Motorcycles In Use			
Number per Household	1.66	1.41	1.58
Mean Engine Displacement	-	690	866
Percent 1100 cc & Over	-	27.0%	32.3%

MOTORCYCLE REGISTRATIONS % OF TOTAL VEHICLES

	1994	2004
Number of Motorcycle Registrations	3,718,127	5,780,870
Percent of Total Vehicle Registrations	1.88%	2.44%

Source: State Motor Vehicle Registrations, 1994, 2004, FHWA

VEHICLE / MOTORCYCLE REGISTRATIONS



Source: State Motor Vehicle Registrations, 1994, 2004, FHWA

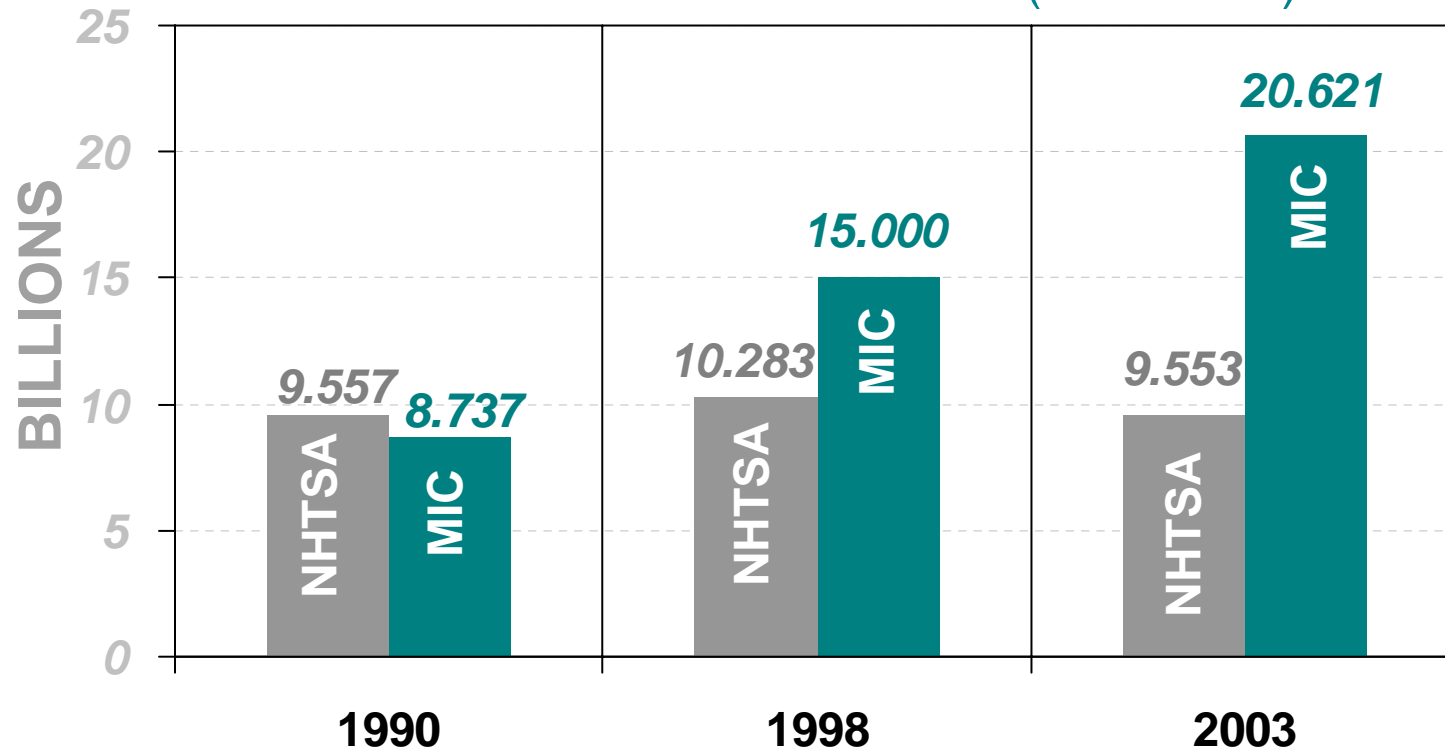
MIC ESTIMATED VEHICLES IN USE



*We estimate that there were nearly **7 million** motorcycles used on-highway in 2003.*

VEHICLES MILES TRAVELED COMPARISONS

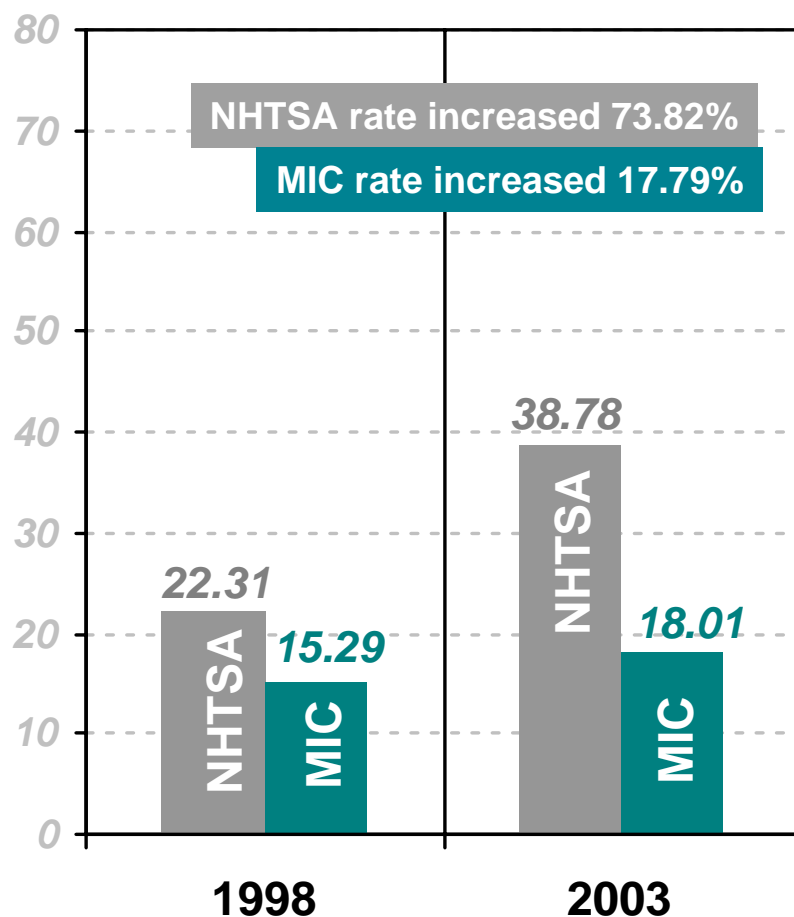
VEHICLE MILES TRAVELLED (BILLIONS)



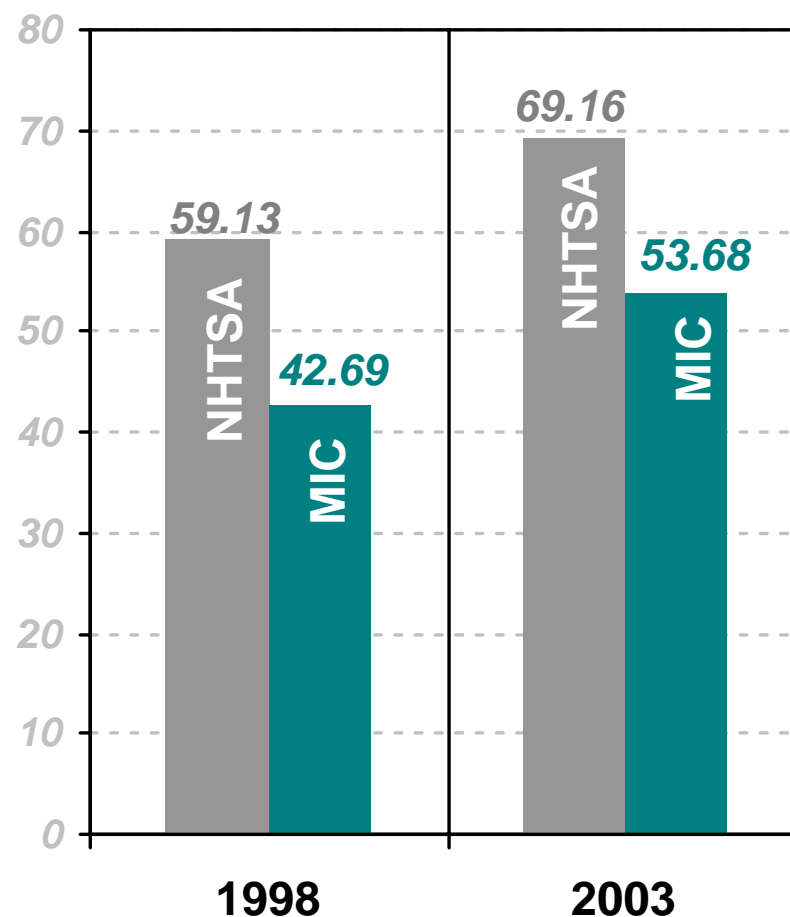
	NHTSA	MIC
1990	9,557,000,000	8,737,430,000
1998	10,283,000,000	15,000,339,000
2003	9,553,000,000	20,621,482,000

FATALITIES per VEHICLES MILES TRAVELED and per REGISTRATIONS

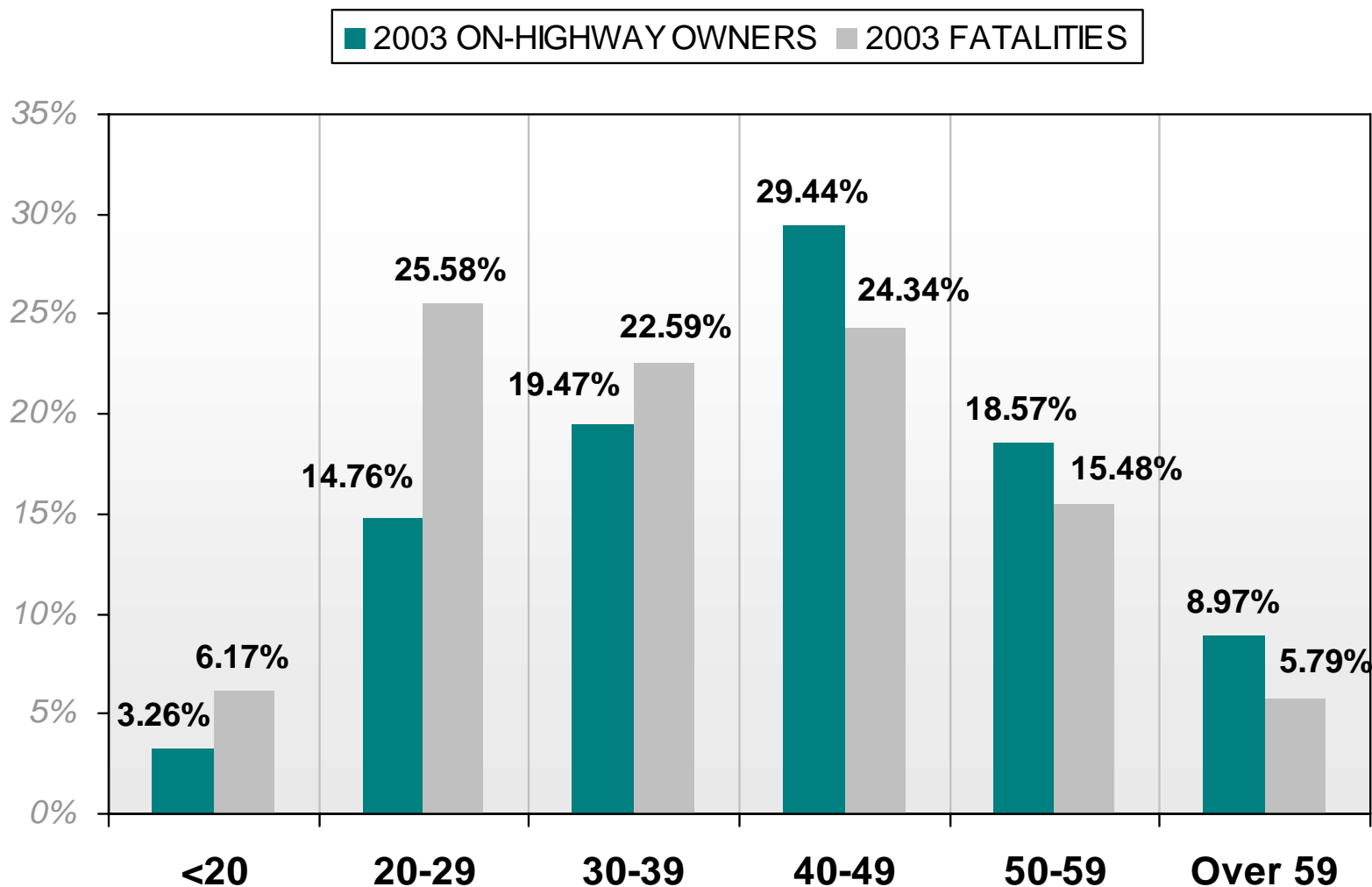
Fatality Rate per 100 million Motorcycle Miles Traveled



Fatality Rate per 100,000 Motorcycles Registered/In-Use

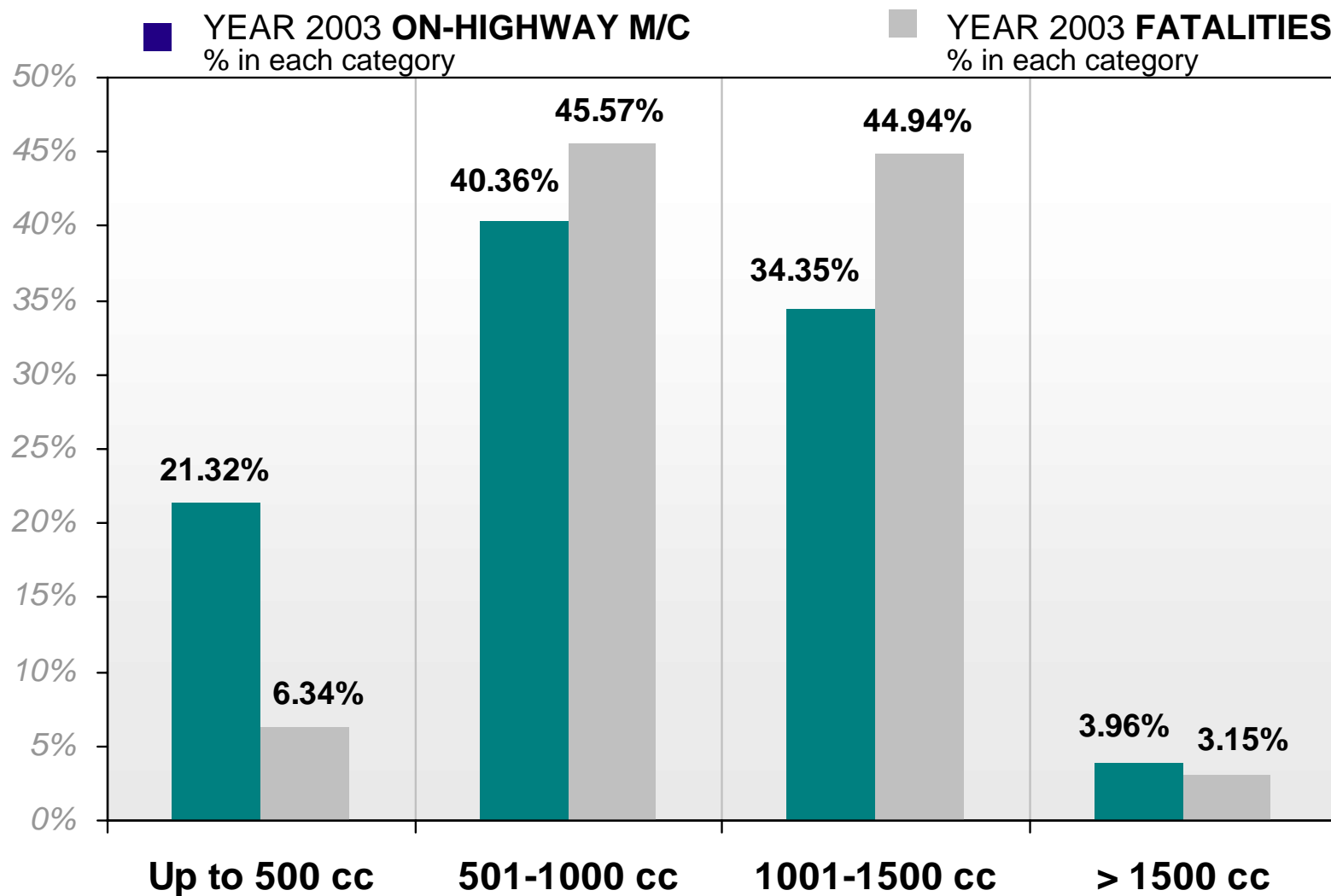


MOTORCYCLE OWNER AGE COMPARED TO FATALITIES: AGE BREAKDOWN



Source: MIC Owners Survey, 2003; Recent Trends in Motorcycle Crashes: An Update, NHTSA, June 2006

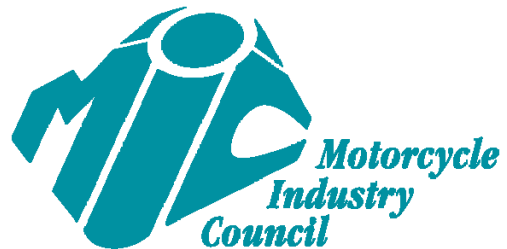
M/Cs IN USE COMPARED TO FATALITIES ENGINE DISPLACEMENT



Source: MIC Owners Survey, 2003; Recent Trends in Motorcycle Crashes: An Update, NHTSA, June 2006

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